



Morgan Stanley

The Lowe Group at Morgan Stanley

Providing you with a family office experience

The Lowe Group's goal is to provide you with a family office style experience. We offer boutique level, white glove attention and comprehensive world-class financial services to a select group of affluent clients and their families.

We strive every day to make a positive difference in your life; to help you overcome the challenges that come with financial success so you can focus on the people and causes you value. We want to be the first place you call when you need help.

While we offer an extensive suite of personalized services we are also happy to provide you with introductions to other professionals in our network whose work we trust.

Call us if you need help with:

Executive financial services
Estate planning strategies
Financial planning
Professional portfolio management
Planning for education funding
Philanthropic services
Business succession planning
Equities

Fixed income
Insurance
IRAs
529 Plans
401(k) rollovers
Alternative investments
Cash management and lending solutions

We don't just manage people's money.
We help manage people's lives.

The Lowe Group at Morgan Stanley

Our Location:
21650 Oxnard Street, 1800
Woodland Hills, CA 91367

Vist Our Website:
<https://advisor.morganstanley.com/the-lowe-group>

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Who to call guide

What do you need done?	Who should you call?
Money movements (Wires, checks, ACH, Journal)	Cynthia or Nieneth
Address change	Cynthia or Nieneth
Request copies of statements or 1099s	Cynthia or Nieneth
Order checks, deposit slips or debit card	Cynthia or Nieneth
Balance inquiry	Cynthia or Nieneth
Schedule review or appointments	Cynthia or Nieneth
Morgan Stanley Online assistance	Cynthia or Nieneth
Morgan Stanley home loans	Cynthia or Nieneth
Life insurance review or purchase	Charlie, Patrick or Mark
Buy/sell stock	Charlie, Patrick or Mark
Portfolio review	Charlie, Patrick or Mark
Investment questions or concerns	Charlie, Patrick or Mark
Estate planning strategies	Charlie, Patrick or Mark
Investment advice	Charlie, Patrick or Mark
Options for outside retirement accounts	Charlie, Patrick or Mark
Executive compensation issues	Charlie, Patrick or Mark
Financial planning	Charlie, Patrick or Mark

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The investments listed may not be appropriate for all investors. Morgan Stanley Smith Barney LLC recommends that investors independently evaluate particular investments, and encourages investors to seek the advice of a financial advisor. The appropriateness of a particular investment will depend upon an investor's individual circumstances and objectives.

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